

井昱

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教育背景

2022 – 现今	香港中文大学（深圳）经管学院 工商管理学士金融学专业在读，辅修经济学专业，预计 2026 年 7 月毕业 祥波励耘奖学金、祥波博文奖学金 II（2022 – 2025） “招商银行”优秀学生助理（2023 – 2024） 主修课程：财务管理，金融学基础，金融经济学，公司金融，计量经济学	中国深圳
2024 夏	香港中文大学 国际交流学生	中国香港
2019 – 2022	西安高新第一中学 中学优秀毕业生，位列陕西省文科高考第 427 名（共计约 8.6 万名考生）	中国西安

实践经验

2025 年 2 月 – 3 月	AXA 安盛（香港） 财富管理实习生 为富裕至高净值客户提供财务管理和财富规划，集税务规划、财富保护、遗产规划、继承规划和家族管理于一体 <ul style="list-style-type: none">实操制定一位客户的家庭综合资产配置，以优化财富保值增长和风险管理	中国深圳
2024 年 12 月 – 2025 年 2 月	蒙特卡罗基金 一家专注于量化投资的私募基金管理公司，策略涵盖股票、套利、CTA，创始人是西安交通大学经金学院金融科技系元向辉教授 FOF 尽调研究员 参与 FOF 管理中的量化（股票）私募尽调，以研究国内量化股票策略为主，完成尽调报告及其他工作材料 <ul style="list-style-type: none">研究分析基金研报，为公司 2025 年的 FOF 组合推荐潜力基金，最终获得公司项目组的认可和采纳使用聚宽量化软件进行股票单因子测试，挖掘出了一个可能有效因子	中国西安
2024 夏	国海证券陕西第一分公司 国海证券是国内首批设立的一家全国性综合类证券公司，涵盖证券、基金、期货、私募股权投资、另类投资等多元业务体系 财富顾问实习生 通过咨询流程积极收集有关客户需求和具体情况的信息，制定个性化策略，使用一系列金融产品和服务来帮助客户实现他们的目标 <ul style="list-style-type: none">协助团队为一位客户进行开户，期间帮助客户填写并提交开户申请，完成合规检查，后续为客户制定了一份初步投资方案	中国西安

其他信息

- 经管头马俱乐部成员
- 大学英语六级；大学英语四级
- MS Office (熟练)，Python/Stata/SQLite/R/Choice/Wind/WRDS/Matlab(基础)
- 国籍：中国；汉语：母语；英语：流利

Yu JING

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EDUCATION

2022–Present	SCHOOL OF MANAGEMENT & ECONOMICS CHINESE UNIVERSITY OF HONGKONG, SHENZHEN Bachelor of Business Administration in Finance Candidate with Minor in Economics, Expected July 2026 Harmonia Inspirational & Bowen II Scholarship (Merit-Based) (2022–2025) Excellent Student Assistant Sponsored by China Merchants Bank (2023–2024) Major courses: Financial Management, Foundation of Finance, Financial Economics, Corporate Finance, Introductory Econometrics	Shenzhen, China
Summer, 2024	CHINESE UNIVERSITY OF HONGKONG International Exchange Student	Hong Kong, China
2019–2022	XI'AN GAOXIN NO.1 HIGH SCHOOL Excellent high school graduate, ranked 427th in Shaanxi Province liberal arts Gaokao (a total of about 86,000 candidates)	Xi'an, China

EXPERIENCE

February– March 2025	AXA HONG KONG AND MACAU Part-time Wealth Management Advisor. Provided financial management and wealth planning for affluent and high-net-worth clients, integrating tax strategies, asset protection, estate and succession planning, and family governance. <ul style="list-style-type: none">Developed and implemented comprehensive family asset allocation strategies to optimize wealth preservation, growth, and risk management	Shenzhen, China
December 2024– February 2025	MONTE CARLO FUND MGMT A private fund management company specializing in quantitative investments, with strategies spanning equities, arbitrage, and CTA. Founder: Prof. Xianghui Yuan Part-time FOF Researcher. Participated in the quantitative (stock) private placement due diligence in FOF management, mainly research domestic quantitative stock strategies, and complete the due diligence report and other working materials. <ul style="list-style-type: none">Recommended potential funds for the company's 2025 FOF portfolio, which were ultimately recognized and adopted by the company's project teamDiscovered a possible effective factor by using JoinQuant Software to test single factors of stocks	Xi'an, China
Summer, 2024	SEALAND SECURITIES SHAANXI FIRST BRANCH Sealand Securities is one of the first national comprehensive securities companies established in China, covering a diversified business system. Part-time Financial Advisor. Proactively gathered client needs through a consultative approach and designed customized financial strategies leveraging diverse products and services to achieve their goals. <ul style="list-style-type: none">Activated a client's investment account efficiently after gathering client information, verifying compliance, and submitting the application	Xi'an, China

ADDITIONAL INFORMATION

- Member of SME Toastmasters Club
- CET6; CET4
- MS Office (Advanced Modeling Skills), Python/Stata/SQLite/R (Basic),
Choice/Wind/WRDS/Matlab (Basic)
- Nationality: Chinese; Mandarin: Native; English: Fluent